

**THE COMMONWEALTH OF MASSACHUSETTS**  
Public Employee Retirement Administration Commission  
John W. McCormack Building, Room 1101  
One Ashburton Place, Boston, MA 02108  
(617) 727-9380

**M E M O R A N D U M**

**TO:** All Retirement Boards

**FROM:** Robert F. Stalnaker, Executive Director

**RE:** Guidelines for Medical Panel Examination Based on Review of Records

**DATE:** October 28, 1997

At its October 22, 1997 meeting the Commission adopted the following Guidelines for determining whether a disability retirement applicant can satisfy the requirement of a medical panel examination by submitting records to be reviewed by the three physicians appointed by the Commission.

**GUIDELINES FOR MEDICAL PANEL EXAMINATION**  
**BASED ON A REVIEW OF RECORDS**

The following are factors that will be considered when determining whether a disability retirement applicant will be allowed to be examined by a medical panel based upon the submission and review of documents by the panel physicians, not requiring the member to actually attend the examination:

1. Application must be a voluntary disability retirement application filed by the member, **not** an involuntary disability retirement application filed by the employer.
2. Completed application must have been on file with the Retirement Board for at least 15 days.
3. Member must reside more than 150 miles from Boston.
4. Member must waive his or her right to attend the examination, in writing.
5. Employer must waive his or her right to attend the examination, in writing.

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6. Member's medical doctor must provide a statement detailing the medical reason, accompanied by supporting medical documentation that would prevent the member from traveling to attend an examination.

When requesting the appointment of a regional medical panel for an examination based on a review of the records, please submit the following:

1. A completed 10-19-792 Request for Regional Medical Panel, indicating at the top of the Form that the Request is for an examination based on a review of records;
2. A completed 10-2-792 Statement of Applicants' Physician In Connection with Application for Disability Retirement accompanied by the doctor's narrative supporting the responses to the questions on the form; and
3. Documentation to support each of the items listed in the Guideline.

If a medical panel examination based on a review of the records is scheduled, the retirement board will be notified and will be required to send complete medical records and all other required documents to the panel physicians in the same manner as if the member would be attending the medical panel examination.

If you have any questions, please contact the Commission's Medical Panel Unit at (617) 727-9380, ext. 631 or ext. 623.